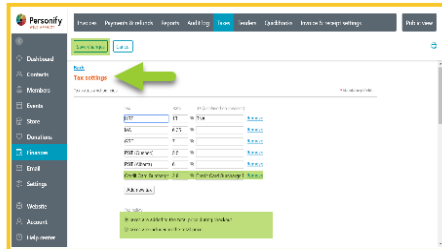


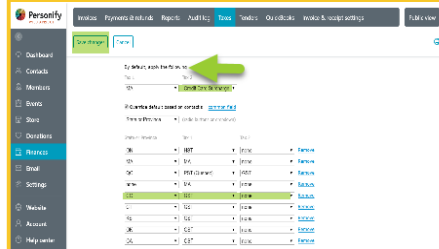
Wild Apricot Cheat Sheet #14

Adding Credit Card Transaction Charges and Convenience Fees

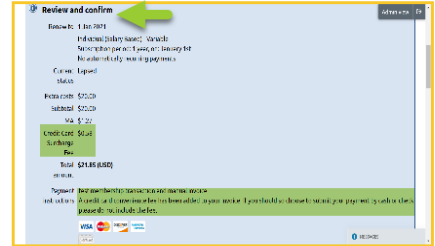
Note: The regulations for assessing fees vary by tax jurisdiction. Before implementing fees, review with your financial or tax advisor.



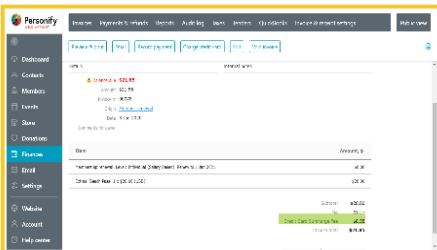
1 Navigate to Finances/Taxes and under Tax Rules, add a new tax and ID displayed on invoices (e.g. "Credit Card Surcharge").



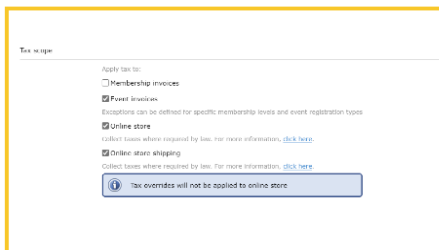
2 Under Tax rates and policies, add the new fee to the default tax rule. A common field (eg State) can specify alternative tax/fee rules.



3 A confirmation screen for a membership renewal will now show the credit card fee based on the tax rules defined. In effect, you can use the tax rules to apply any fee that can be calculated with a percentage of the total invoice amount. You can use the Payment Instructions field in Settings/Payment Settings to explain the fees. NOTE: These fees are automatically applied for both online and offline transactions.



4 An invoice created during a membership renewal shows the credit card fee.



5 See Tax scope in Finances/Taxes to charge taxes & fees for memberships, events and the online store.